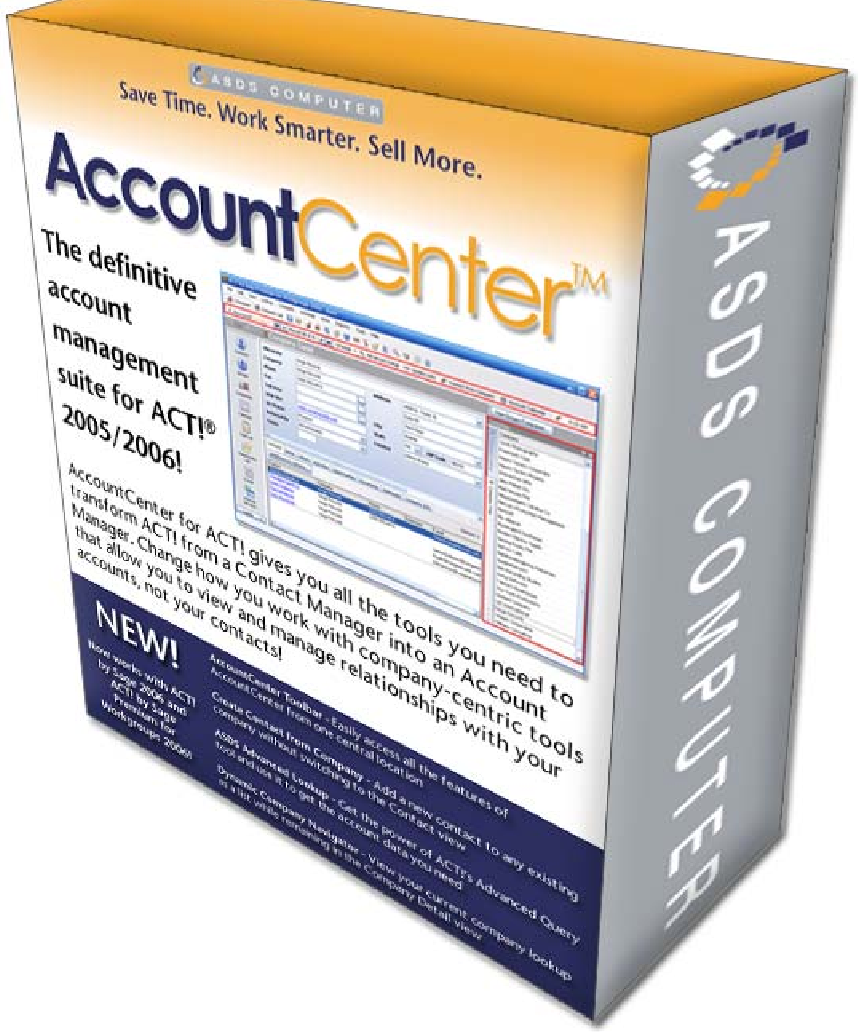


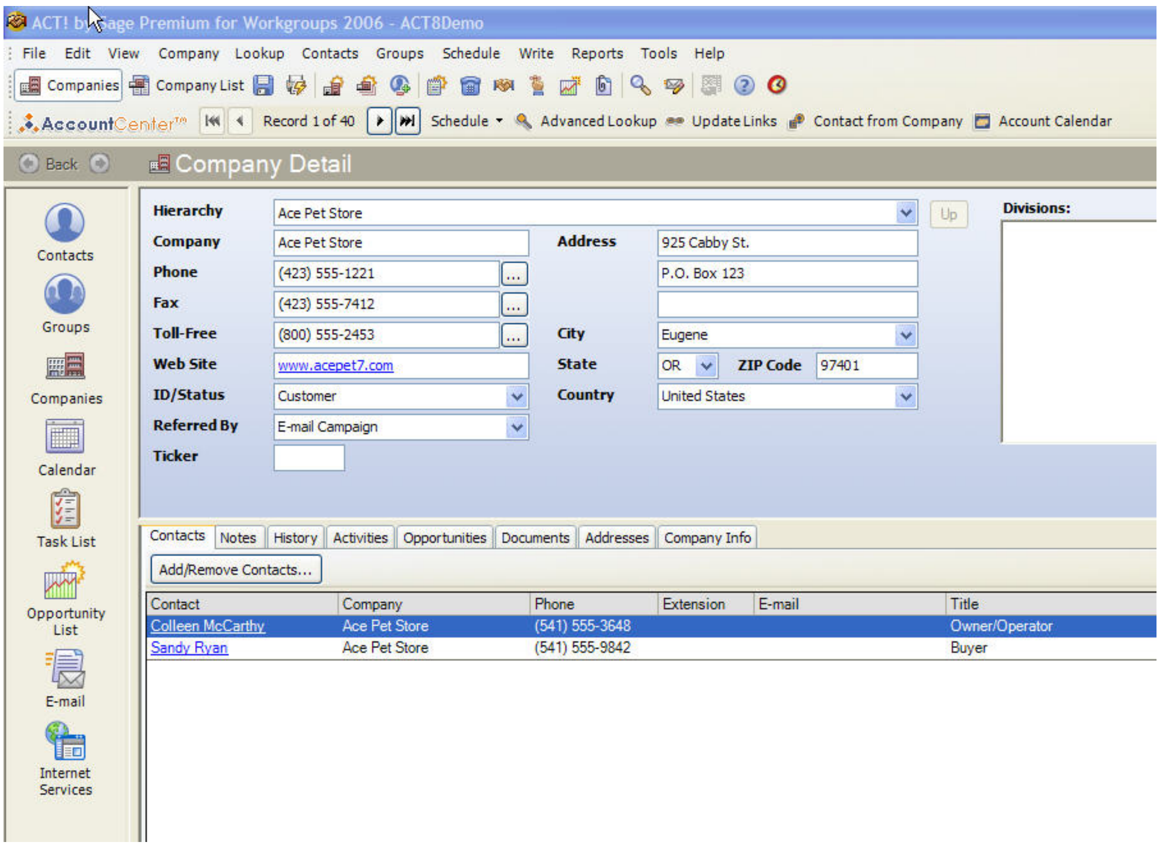
AccountCenter

Table Of Contents

Using AccountCenter

Getting Started

With AccountCenter for ACT! installed, when you start ACT!, it will default to the company view. You will now have an AccountCenter toolbar as well. This toolbar contains the various tools that are part of AccountCenter for ACT!. You will also find these items in the menu system in ACT!. These items will be covered in detail throughout the help documentation.



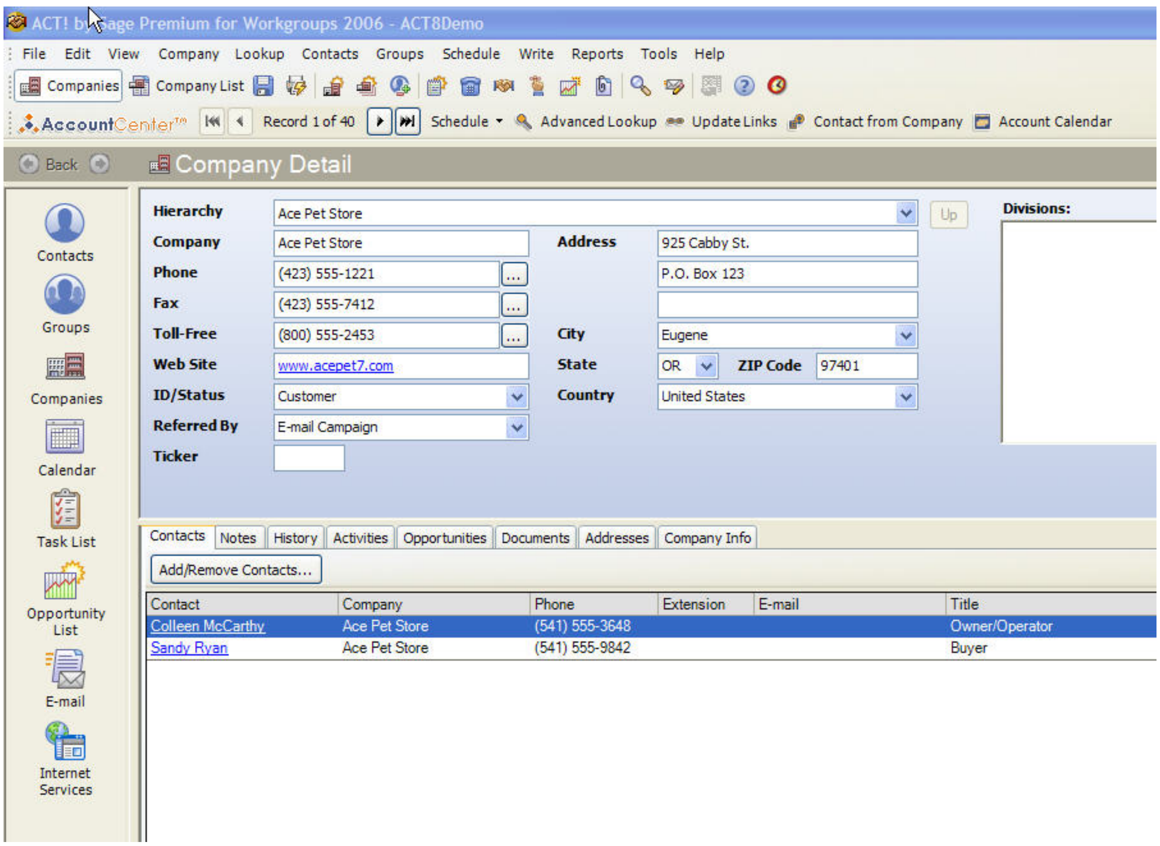
NOTE: When ACT! loads with AccountCenter installed, the companies are sorted based on ACT!'s Edit>Sort settings (only applicable to Contact records). By default, those are Company name and then Contact. This can make it appear that your company records are sorted randomly when you have many contacts with no company name. You can alleviate this by ensuring that all of your contacts have data in their Company fields.

AccountCenter Toolbar

AccountCenter Toolbar Overview

The AccountCenter toolbar loads up at startup. The AccountCenter toolbar will show up on ALL of your different views in ACT!, however only the tools that are available in those areas will be displayed on the toolbar. The various tools listed across the toolbar are covered below as well as in more detail throughout the AccountCenter help topics.

Here is an example of the AccountCenter toolbar being loaded on startup.



Navigator: Allows you to scroll through the company list in detail view based on a lookup of companies.

Schedule Button: You have two options via the schedule drop down menu. You can either schedule an activity or clear an activity for the current company you are viewing. By default, the contact selected on the 'Contacts' tab will be used to schedule the activity.

Advanced Lookup Button: Supports all Boolean logic operators and full SQL searches of ACT! companies.

Update Links Button: Creates companies from contacts and links contacts to companies.

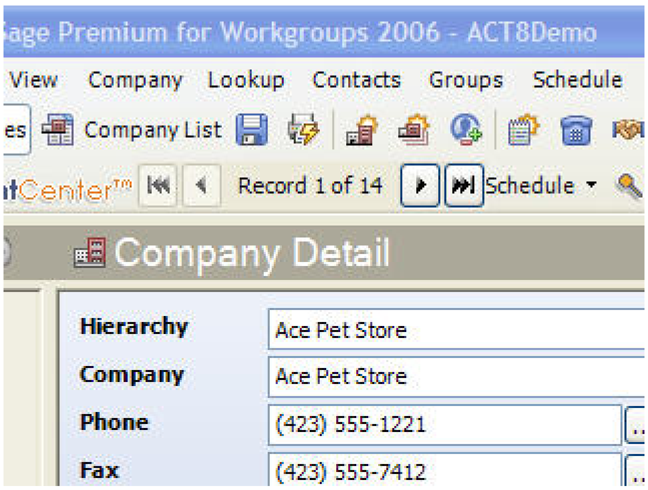
Contact from Company Button: Allows for quick creation of a contact based on the current companies details without leaving the company view.

Account Calendar Button: Provides a calendar that is filtered for the current company and/or group.

Account Time: This tool will show you the current time for the account you are viewing. It is based on the Zip Code that is entered for the company.

1. AccountCenter Navigator

The AccountCenter navigator is used to scroll through your current list of companies in the company detail view. Selecting the single arrows scrolls one record at a time, and selecting the double arrows will take you to the beginning or end of the list of companies. This control works just as the ACT! navigator does. See the example below:



2. Schedule Button

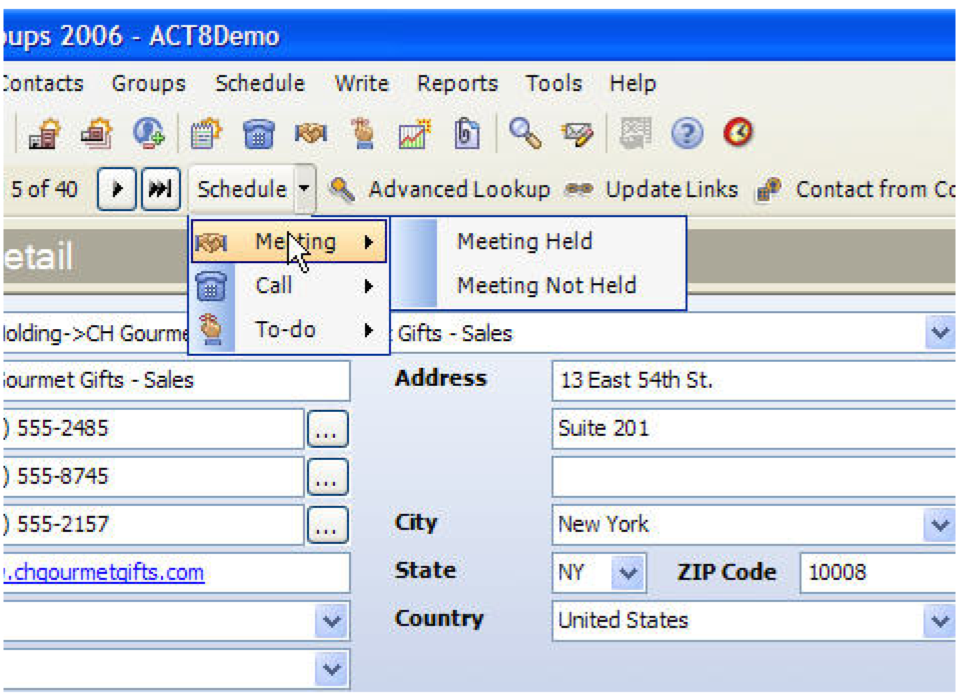
The schedule button has two functions. It is used to either schedule an activity for the current company, group or contact as well as recording a history for the current company, group or contact. See the examples below for specific steps on using this feature.

Scheduling an activity:

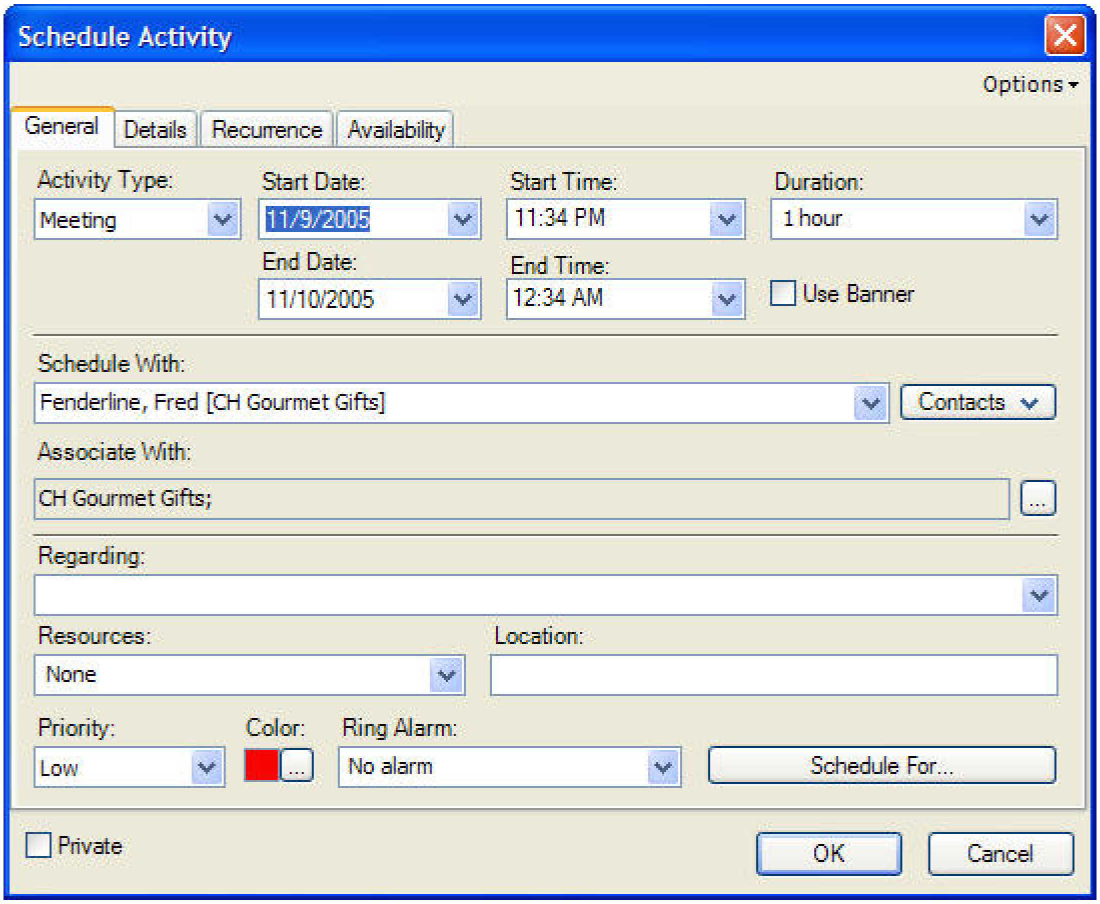
1. Click the arrow next to the schedule button on the AccountCenter toolbar to bring down your list of options.
2. Single click on either "Meeting", "Call" or "To-do".
3. This will bring up the "Schedule Activity" dialog box.
4. Fill out the information as required.

Note: The current contact that was highlighted for the company is automatically selected as well as the activity is automatically associated with the current company.

See the example below:



After choosing "Meeting", the following dialog box appears:

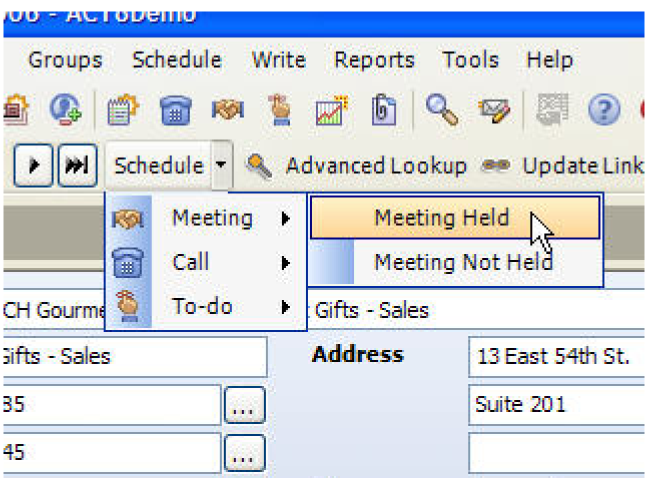


NOTE: One of the key benefits of using the AccountCenter schedule button is when you are NOT on the contacts tab in the company view. By default ACT! will just automatically schedule it for the record you were on, however with AccountCenter, we will pull up a box for you to choose the correct contact to schedule the activity for. See the example below:

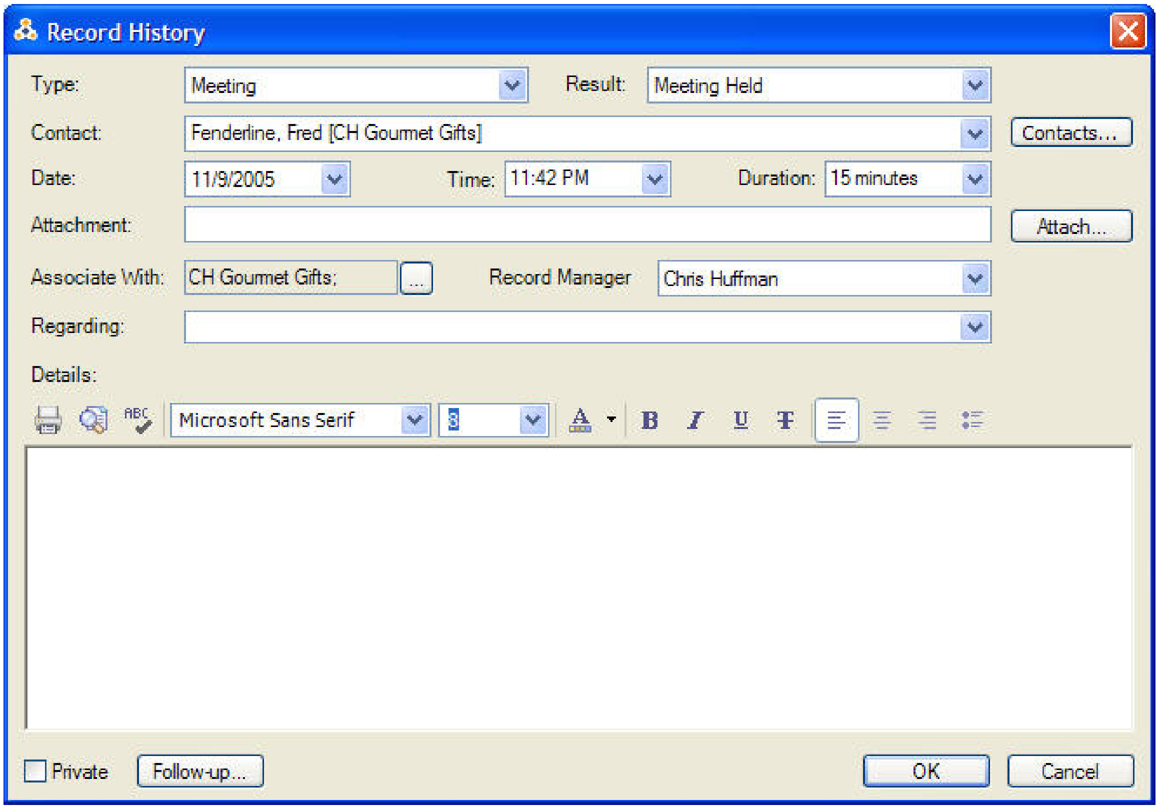
Recording a History:

1. Click the arrow next to the schedule button to bring down your list of options.
2. Hover over "Meeting", "Call" or "To-do" to expose the flyout options for these types of activities.
3. From the flyout menu select the desired results you wish to record a history for.
4. This will bring up the "Record History" dialog box.
5. Fill out the information as required.

See example below:



After choosing "Meeting Held" the following dialog box appears:


Record History
Type:
Meeting
Result:
Meeting Held
Contact:
Fenderline, Fred [CH Gourmet Gifts]
Contacts...
Date:
11/9/2005
Time:
11:42 PM
Duration:
15 minutes
Attachment:
Attach...
Associate With:
CH Gourmet Gifts;
Record Manager
Chris Huffman
Regarding:
Details:
Microsoft Sans Serif
Private
Follow-up...
OK
Cancel

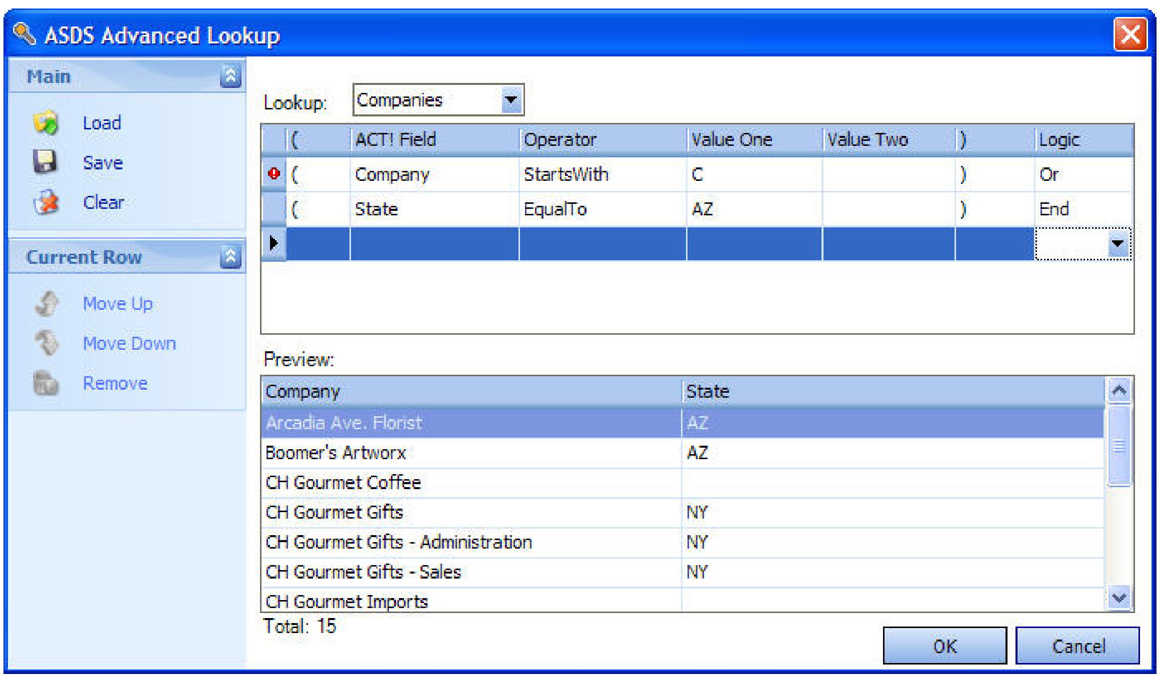
3. Advanced Lookup

The advanced lookup tool gives you the ability to do all boolean logic operators and full SQL searches of ACT! companies. This feature is not available in ACT! alone. You only have the ability to do advanced lookups for ACT! contacts with ACT! alone. Now you have the ability to do these same types of advanced queries for your ACT! companies. See the examples below for specific steps on using this feature.

Creating an advanced query:

1. Click the "Advanced Lookup" button on the AccountCenter toolbar. This brings up the "ASDS Advanced Lookup" dialog box.
2. Enter the operators using standard boolean logic or SQL type query language.
3. Click "Save" if you wish to save this query for later use.
4. Click "OK" to process the query.

See the example below:



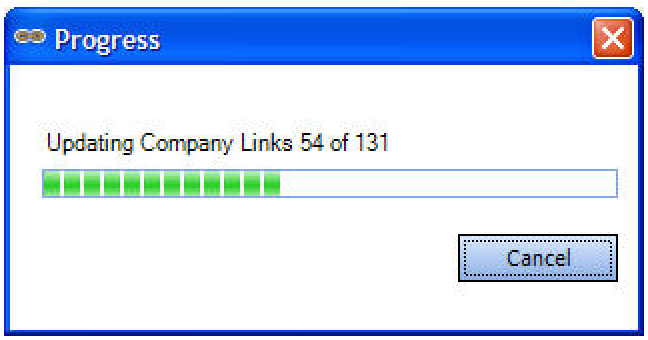
4. Update Links

The "Update Links" feature will link all contacts to a corresponding company record. This feature makes quick work of creating company records for contacts that already exist in the database. This feature is simple and quick to use. See the example below for steps on how to use this feature.

Updating Company Links:

1. Click the "Update Links" button on the AccountCenter toolbar.
2. Wait for the process to complete. This happens automatically with no User intervention required.

See example of the progress indicator below:



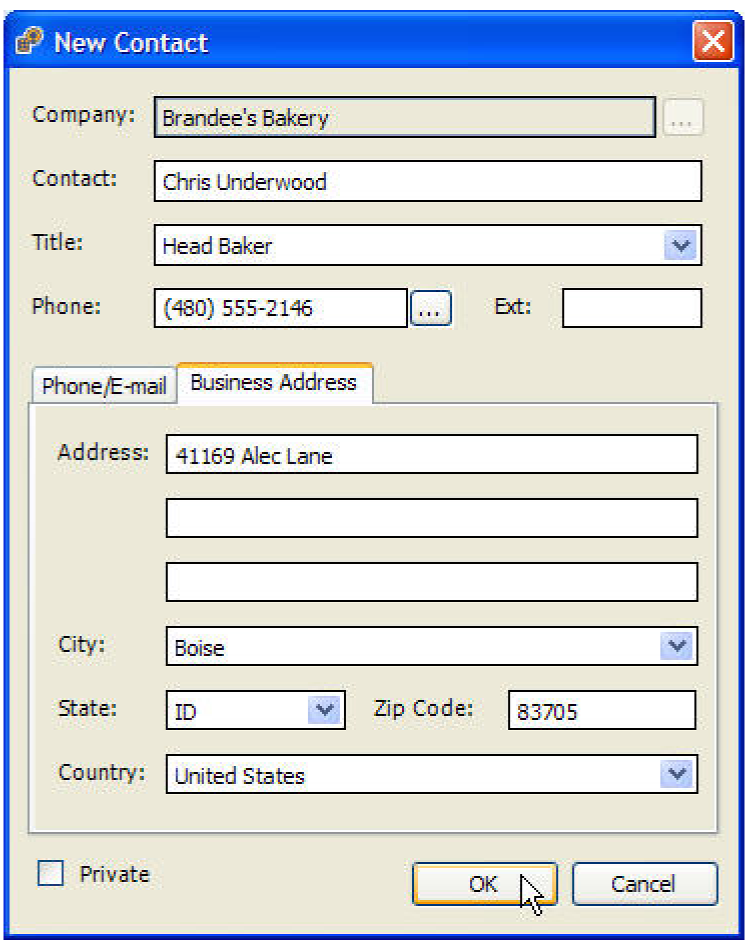
5. Contacts from Company

The "Contacts from Company" feature gives you the ability to quickly create a contact record in the ACT! database for the current company without having to leave the company view in ACT!. This makes is very quick and easy to create contacts based on companies. See the example below for steps on how to use this feature.

Creating a contact from a company:

1. Click the "Contact from Company" button on the AccountCenter toolbar. This will bring up the "New Contact" dialog box.
2. Enter the needed information in the various fields on the "New Contact" dialog box. **Note:** The business address is automatically populated based on the company address you already have entered into ACT!.
3. Click "OK" to create the new contact record.

See the example below:

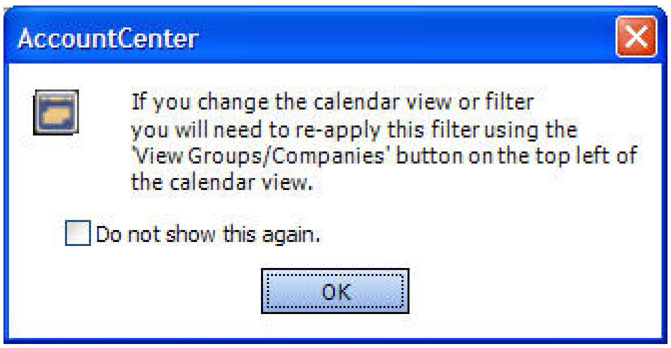


6. Account Calendar

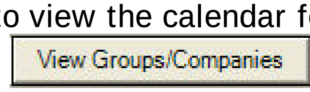
The "Account Calendar" feature will let you look at a calendar that is filtered just for the current company/group that is selected. This gives you a quick snapshot of the activities scheduled just for the company you are looking at. See the examples below.

Viewing the Account Calendar:

1. Click the "Account Calendar" button from the AccountCenter toolbar.
2. Click "OK" to the warning message that appears. (See Below)

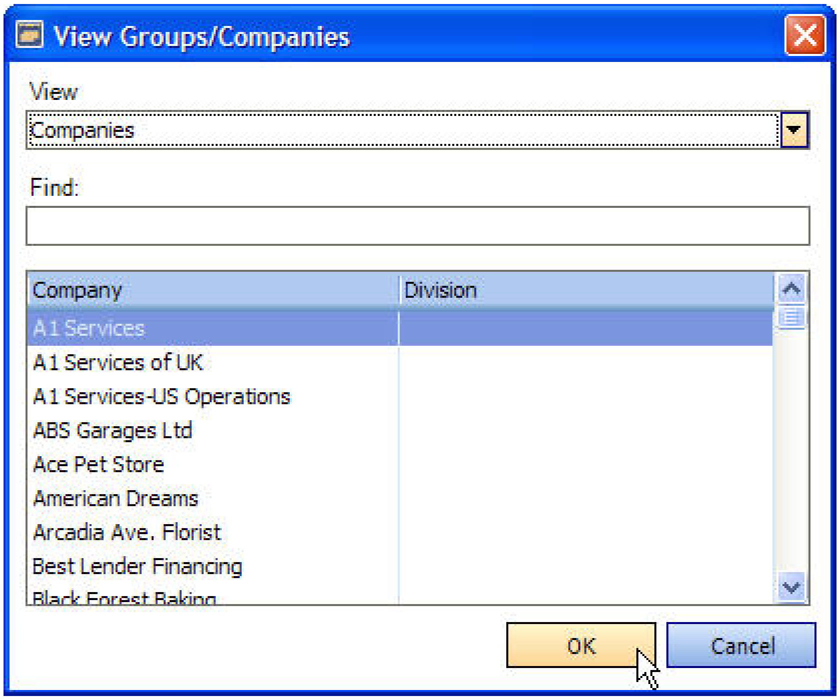


You are now presented with a calendar that is filtered for only the current company or group you were working in at the time you pressed the "Account Calendar" button.

If you wish to view the calendar for another company, this is achieved by pressing the 

button. This will pull up the dialog box shown below.

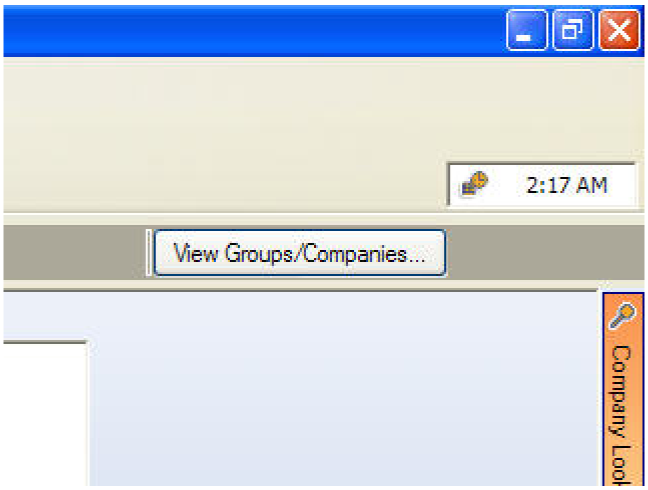
NOTE: When you first start ACT! with AccountCenter, you will need to change views at least once after looking up a company to 'refresh' the ACT! lookup before the Account Calendar will filter properly. This only needs to be done after the first company lookup, all subsequent company lookups refresh automatically.


View Groups/Companies
View
Companies
Find:
Company
Division
A1 Services
A1 Services of UK
A1 Services-US Operations
ABS Garages Ltd
Ace Pet Store
American Dreams
Arcadia Ave. Florist
Best Lender Financing
OK
Cancel

7. Account Time

The account time feature will show you the current time based on the zip code for the current company record you are on. To use this feature you simply must enter a zip code on your company record information. The time will automatically change based on the zip code when you scroll though your different companies.

See an example of the account time below:

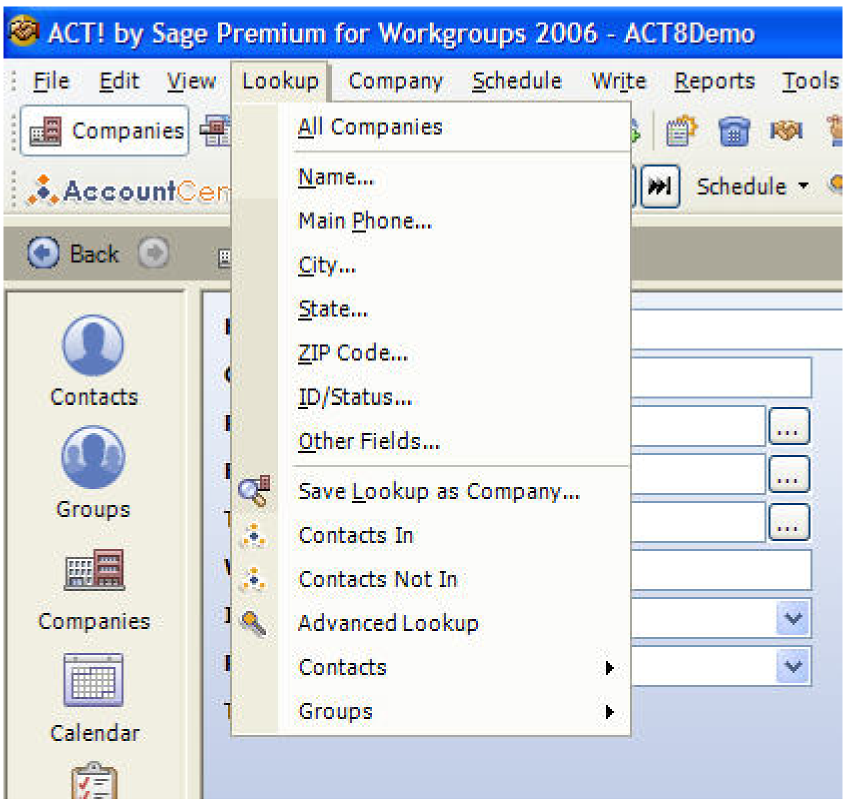


Note: This feature only supports US zip codes at the present time.

AccountCenter Menus

AccountCenter Menus Overview

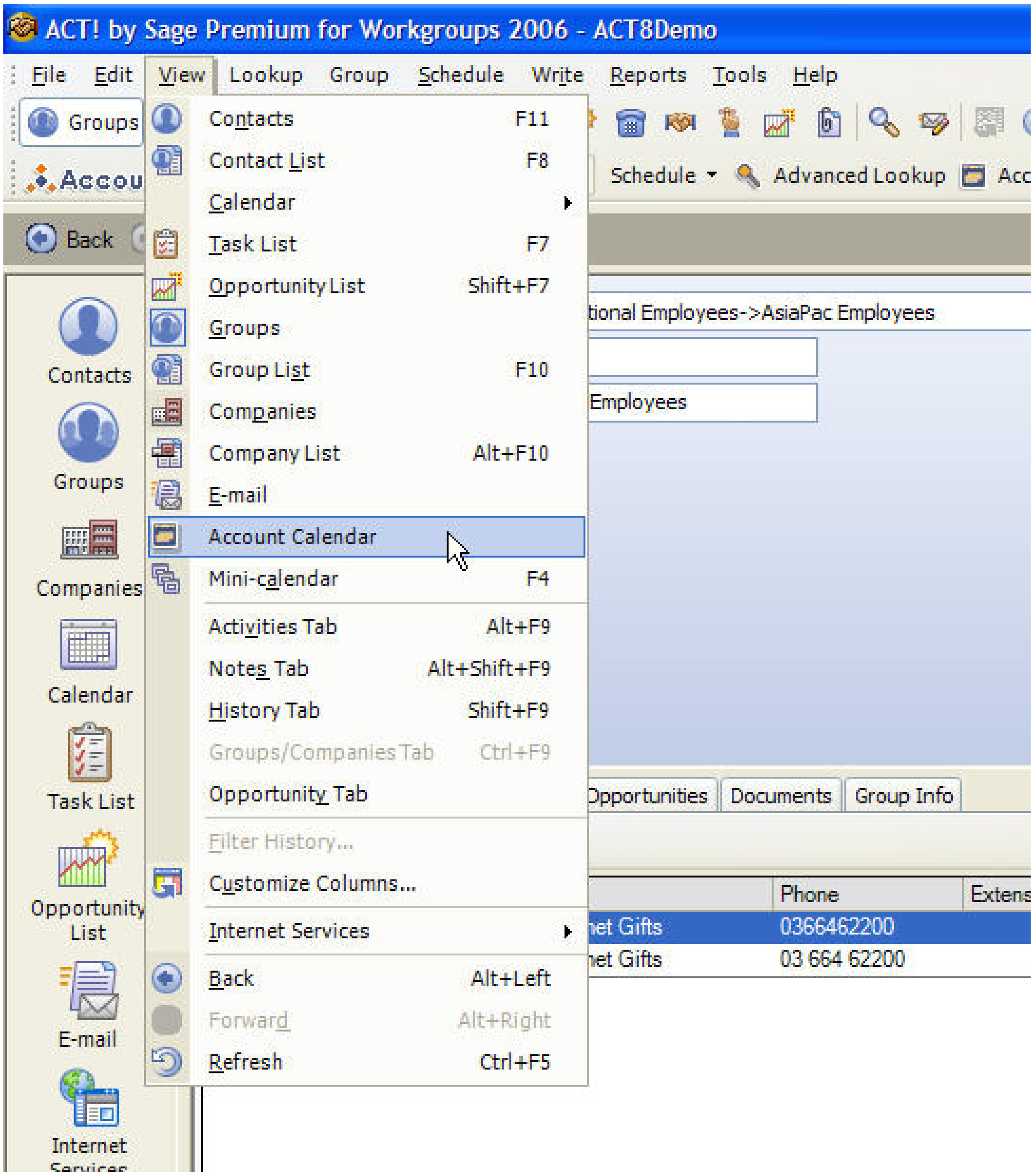
After installing AccountCenter for ACT!, your menus will be modified to show the new tools you get with AccountCenter for ACT!. These are covered in more detail throughout these help topics. In addition, some of the menus are reorganized to make quick work of using your companies and groups. The biggest example of this is the "Lookup" menu. AccountCenter will make the items under the "Lookup" menu centric to Companies or Groups instead of Contacts. See an example below of the modified "Lookup" menu you get with AccountCenter for ACT! installed.



Without AccountCenter for ACT! installed, in order to do lookups on company fields, you would have been forced to go to **LOOKUP > COMPANIES > FIELD**. However, as you see above, The company fields are moved directly to the top of the lookup menu.

1. View Menu

In addition to accessing the Account Calendar from the AccountCenter toolbar, you can also access this feature under the "View" menu in ACT! while in the Company view or the Group view. See the example below:

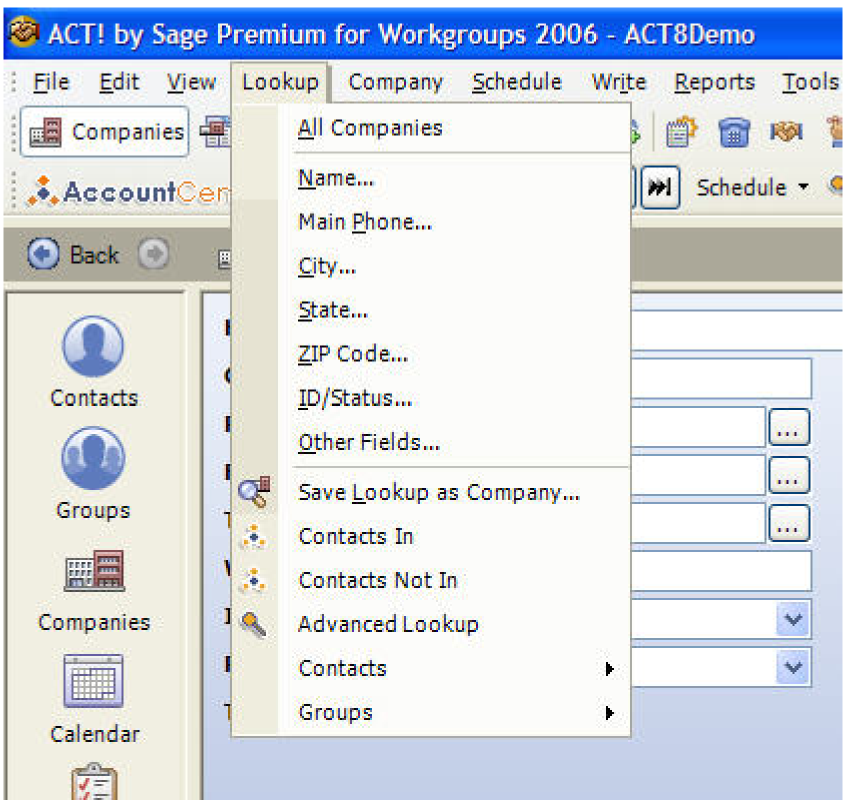


2. Lookup Menu

With AccountCenter installed, the Lookup menu will be modified to make it quick and easy to perform lookups for only Company information. This eliminates the need to drill down to the company lookups as you normally would have to do in ACT! alone. In addition there are some additional lookup features that make finding your companies quick and easy. These are explained below:

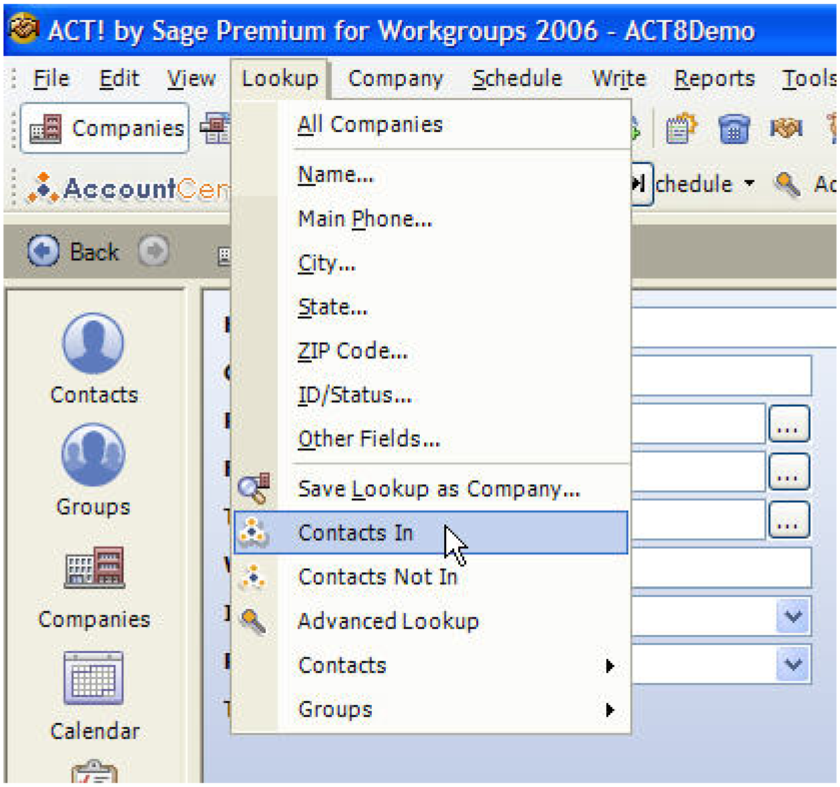
Modified Lookup Menu:

Without AccountCenter for ACT! installed, in order to do lookups on company fields, you would have been forced to go to **LOOKUP > COMPANIES > FIELD**. However, as you see below, The company fields are moved directly to the top of the lookup menu.

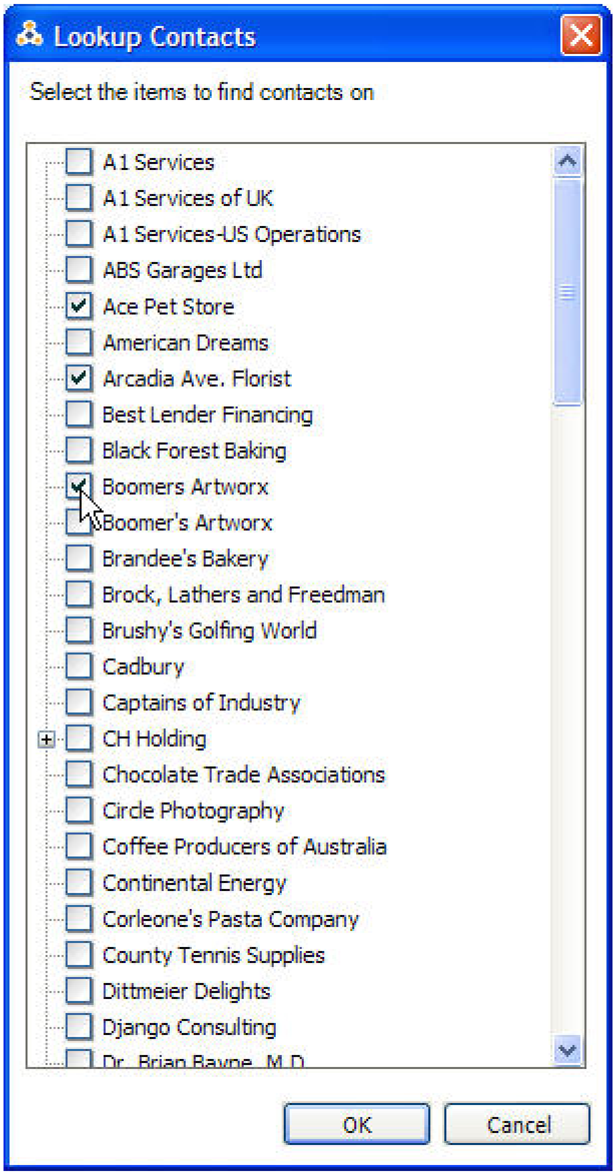


Lookup contacts that ARE associated with a company or group:

This lookup will bring up a box to select the desired companies, and the result will be a list of the contacts that are part of those companies you selected. See the examples below.

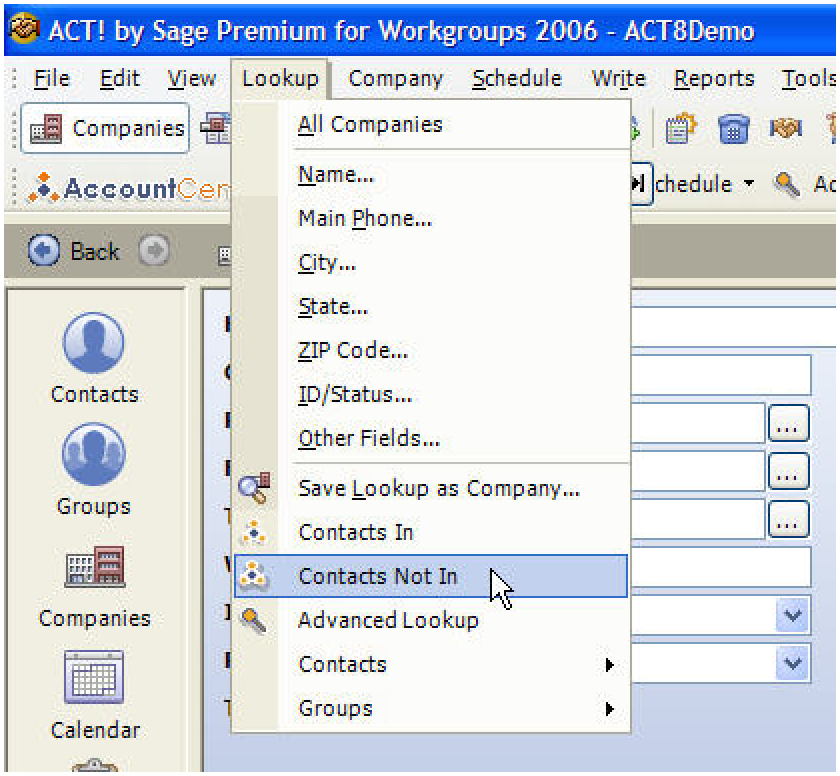


Once you click "Contacts In" you will be presented with the select dialog box. See below.

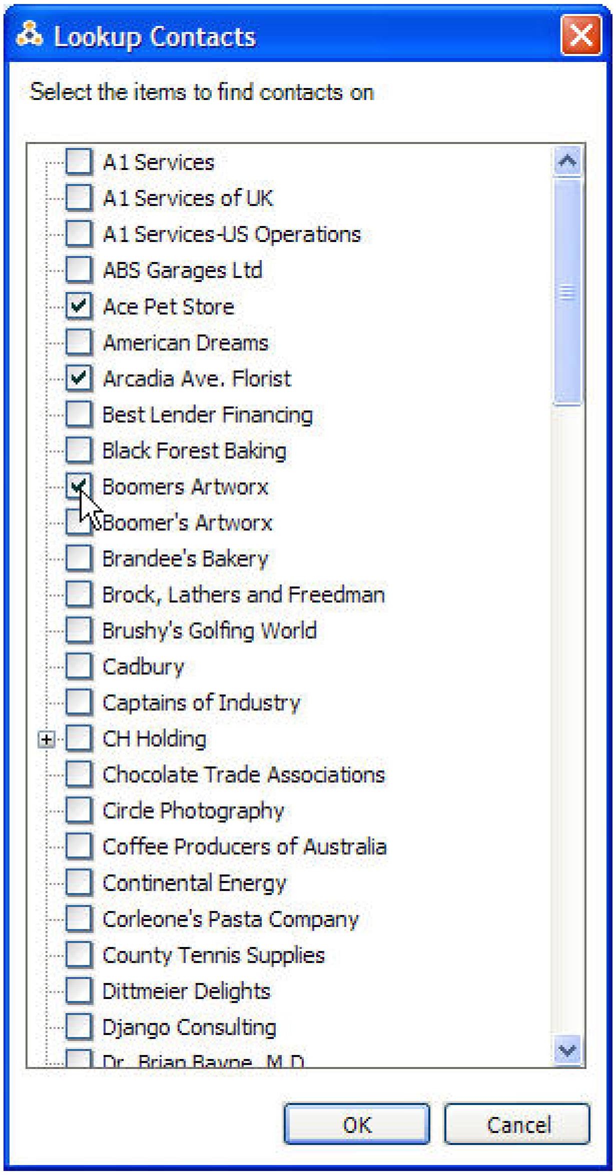


Lookup contacts that are NOT associated with a company or group:

This lookup will bring up a box to select the desired companies, and the result will be a list of the contacts that are NOT part of those companies you selected. See the examples below.

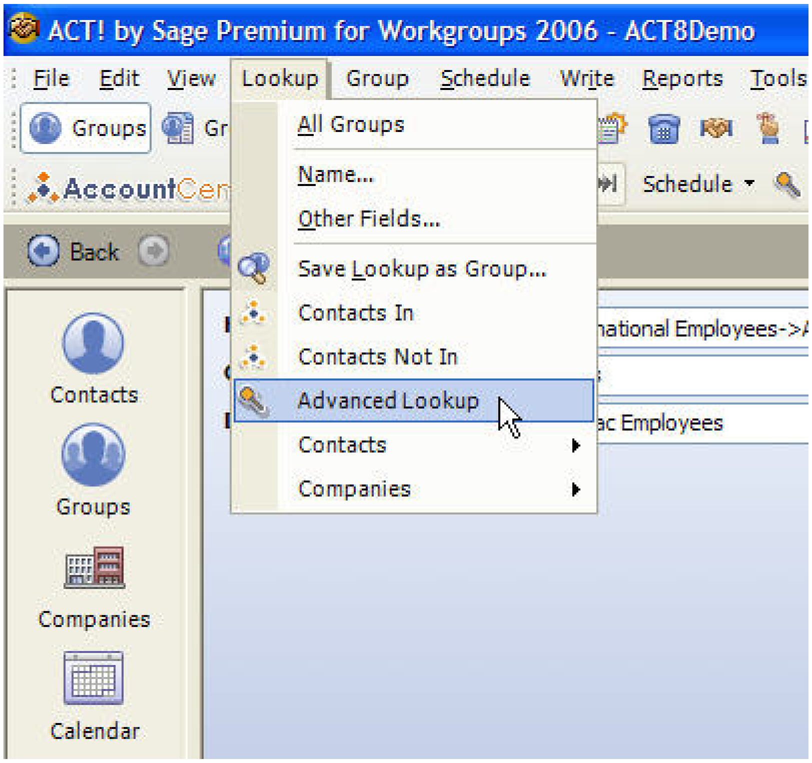


Once you click "Contacts Not In" you will be presented with the select dialog box. See below.

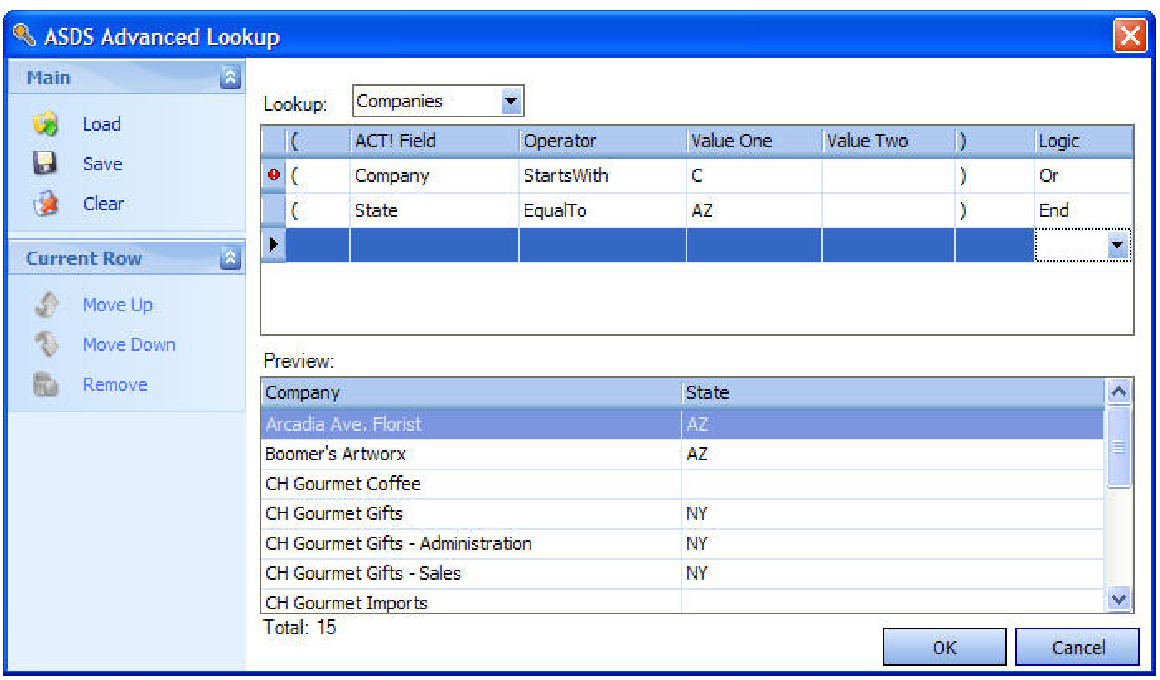


Advanced Company Lookups:

The advanced lookup tool gives you the ability to do all boolean logic operators and full SQL searches of ACT! companies. This feature is not available in ACT! alone. You only have the ability to do advanced lookups for ACT! contacts with ACT! alone. Now you have the ability to do these same types of advanced queries for your ACT! companies. See the examples below.



Once you click on "Advanced Lookup" you will be presented with the ASDS Advanced Lookup dialog box. From here you can create your query as well as Load and Save queries for future use. See below.

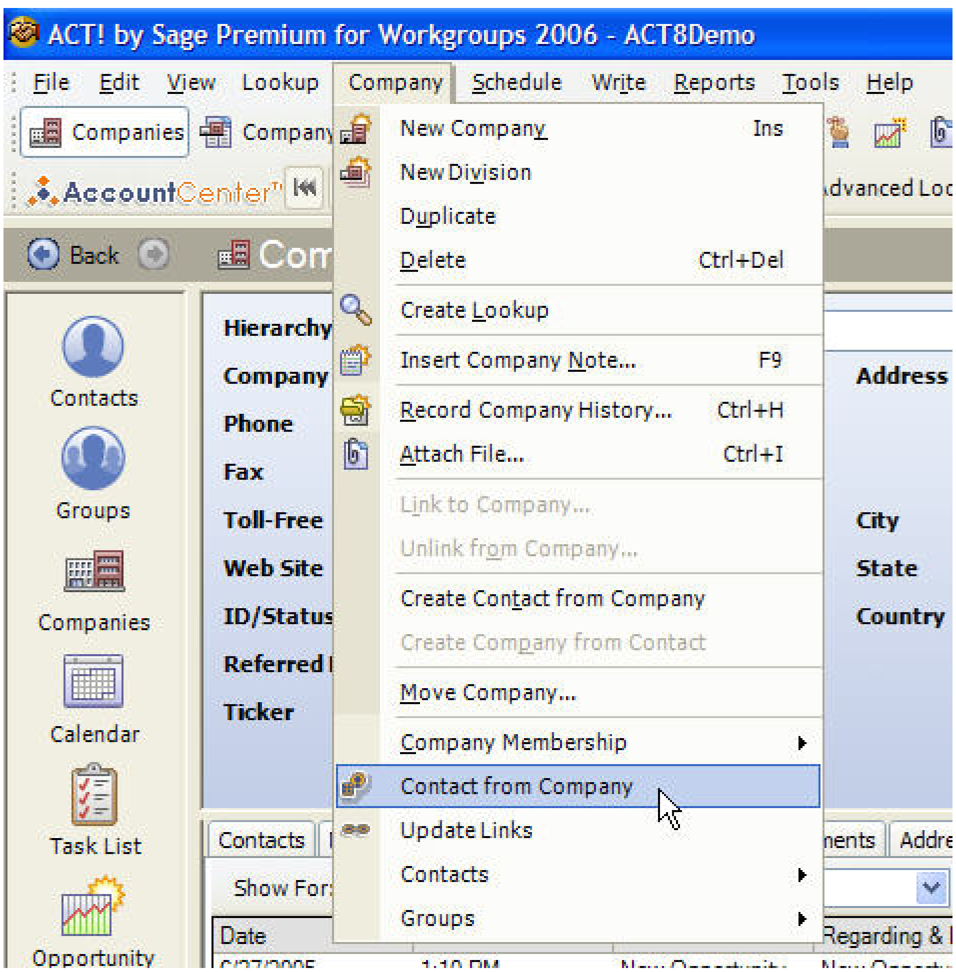


3. Company Menu

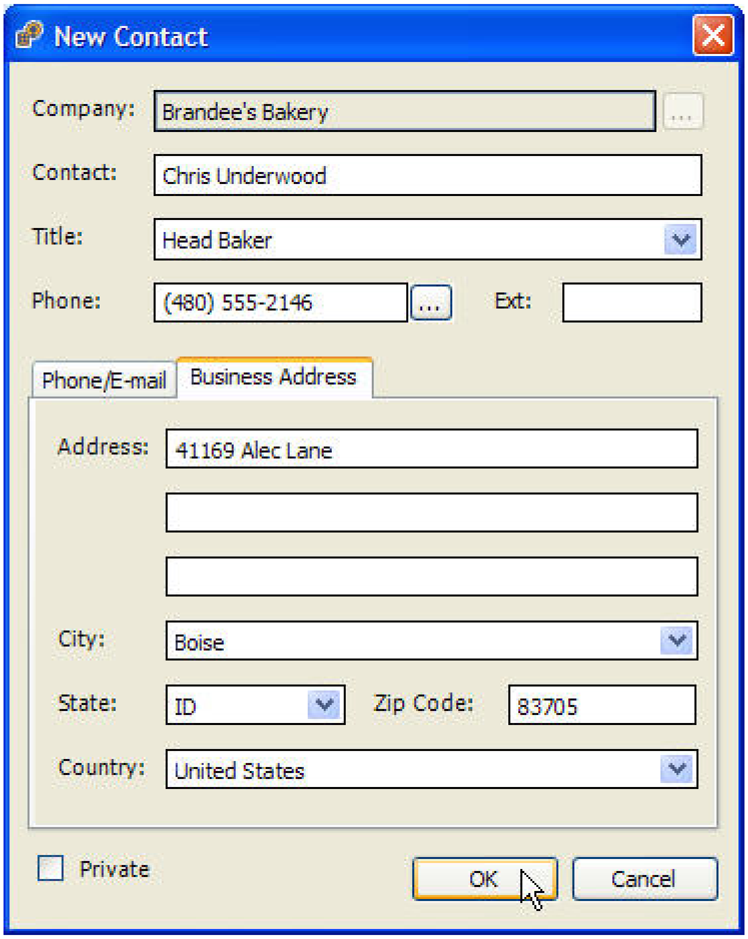
In addition to these features being accessed from the AccountCenter toolbar, you will have "Contacts from Company" as well as "Update Links" available from the "Company" menu. See the examples below.

Creating a contact from a company:

The "Contacts from Company" feature gives you the ability to quickly create a contact record in the ACT! database for the current company without having to leave the company view in ACT!. This makes is very quick and easy to create contacts based on companies. See the example below for steps on how to use this feature.

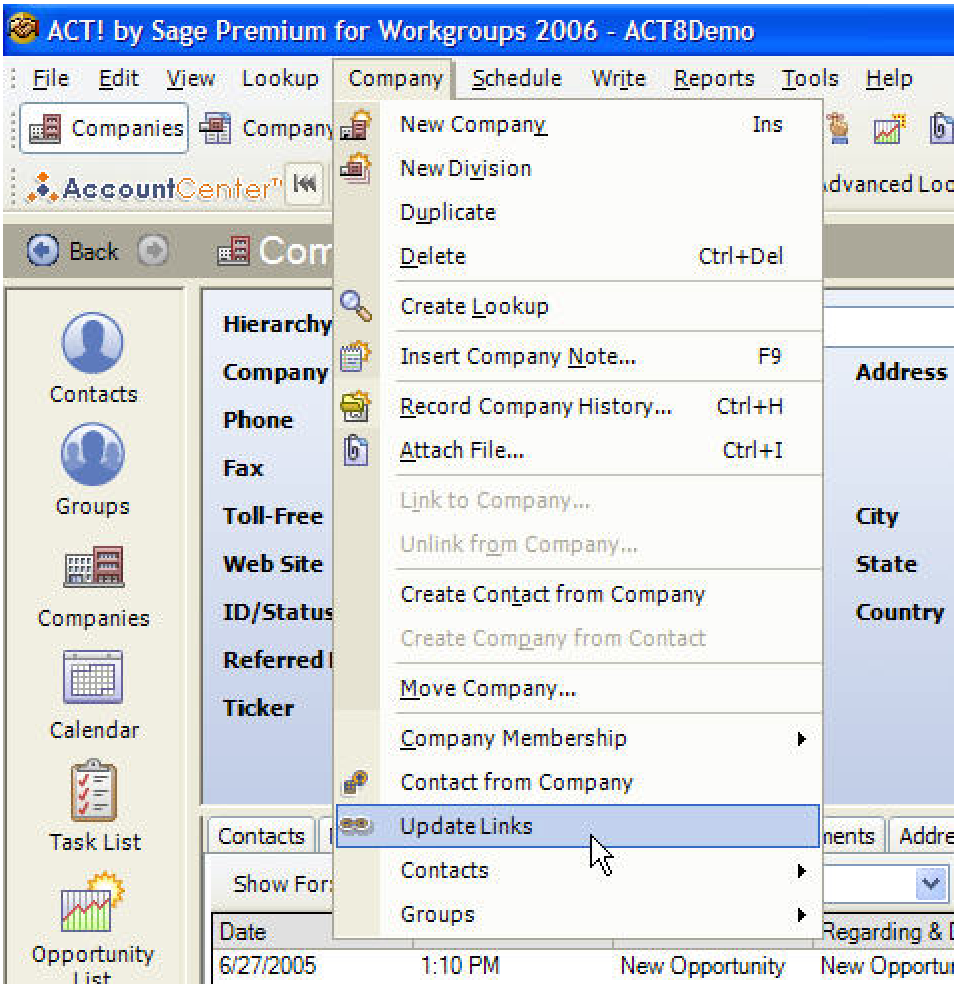


Once you click on "Contact from Company" item, you will be presented with the "New Contact" dialog box. *Note: The business address is automatically populated based on the company address you already have entered into ACT!.*

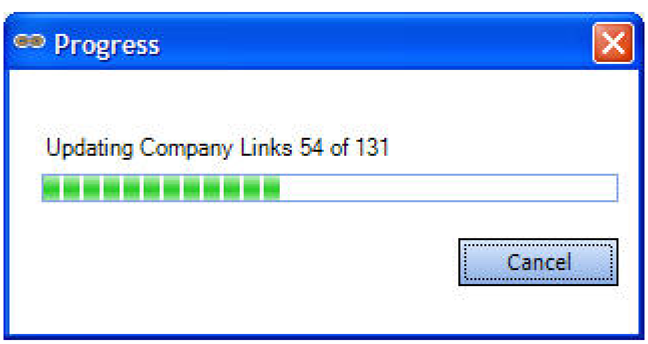


Updating Company Links:

The "Update Links" feature will link all contacts to a corresponding company record. This feature makes quick work of creating company records for contacts that already exist in the database. This feature is simple and quick to use. See the example below.



Once you click the "Update Links" item, you will see a progress indicator to show the updates being processed. See an example of this below.



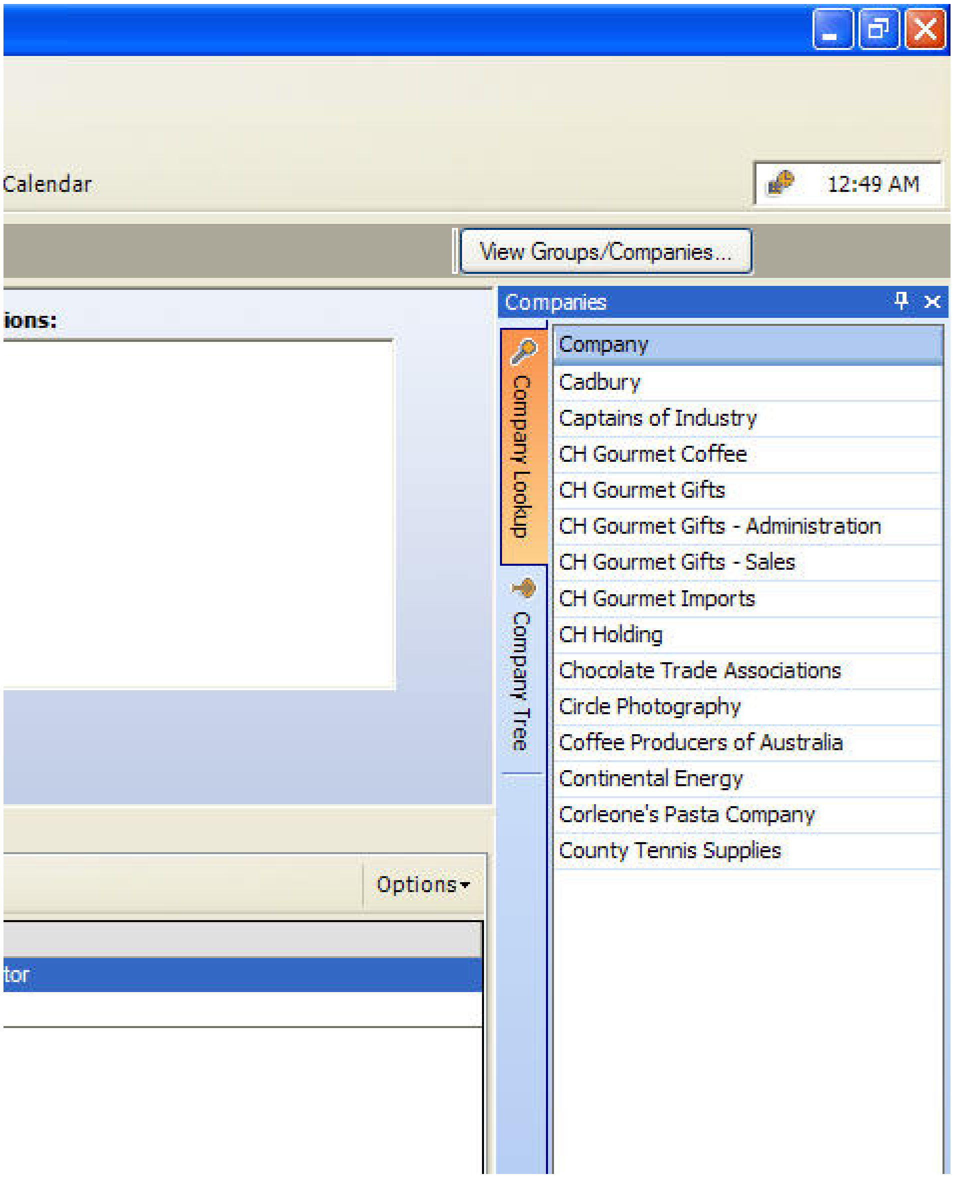
AccountCenter Dynamic Company Navigator

AccountCenter Dynamic Company Navigator

The dynamic company navigator feature allows you to view your current company lookup as a list while remaining in the Company Detail view, or switch to the company tree view. You can move or resize this to fit your needs. If you wish to have this navigator up all the time, you can press the push pin button to make it stick. See an example of the dynamic company navigator below:

Using the Dynamic Company Navigator:

Here is an example of the navigator showing the current company lookup of companies that start with "C":



At this point, you can work with your lookup right from the navigator by simply clicking the next company in your lookup within the dynamic company navigator that you want to work with.

Note: If you click the "X" and close the navigator, you can right click anywhere on the AccountCenter toolbar and choose "Companies" to pull it back up again.

Contact Us

Technical support is available by visiting the ASDS Computer Co. Website. We offer several services to meet your technical support needs. Please visit us today!

AccountCenter for ACT!

Welcome to AccountCenter for ACT!.

AccountCenter for ACT! gives you all the tools you need to transform ACT! from a contact manager into an account manager. Change how you work with company-centric tools that allow you to view and manage relationships with your accounts, not your contacts!

System Requirements

- Computer with a Pentium III or better processor.
- Microsoft Windows 2000, XP or 2003.
- ACT! 2005 Standard or Premium or later. *Note: For ACT! 2005, you MUST be using 7.0.4*

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